



U.S. General Services Administration

Federal Acquisition Service

Directed Buy

GSA Training Module Developed for NITCP

Directed Buy Training Module Overview

Description: This training module will take you step-by-step through the Directed Buy document in the Regional Business Application (RBA) IT-Solutions Shop (ITSS) component.

Navigation: If the tutorial opens up in your web browser, simply click your mouse or your space bar to advance to the next slide. Use the “Backspace” key to go back. If the tutorial opens in the PowerPoint application, click on “F5” to view the tutorial. Use the spacebar or click your mouse to advance to the next slide. To go back, click on the “Backspace” key.

Directed Buy Glossary

Term	Definition
Directed Buy	Creating a Directed Buy on the basic mod (00) bypasses the RFQ process - a single contractor is selected on the BOMSOW to be issued the order directly.
Dollars Subform	The Dollars subform has fields for capturing costs, fees, totals, and other money-related values. The Dollars subform needs to be populated and submitted prior to certification of funds.
Flat Fee	A type of GSA Fee where the client is charged a flat rate. Flat fees are billed to the client upon acceptance of the first invoice against the task item.
Surcharge	A type of GSA Fee where the client is charged a calculated percentage of the task item cost.
Surcharge Amount	The calculated product of the cost of the task item times the task item surcharge rate.
Surcharge Rate	A percentage used to calculate the GSA Fee if the type of fee for the task item is Surcharge.

Directed Buy Privileges

User Role Action	Create	Edit	View
GSA user	✓ *	✓	✓
Client			✓
Contractor			✓ **

*Cannot create Directed Buy if 'Publish in e-Buy' field on BOMSOW set to 'Yes'

**Can only view Directed Buy if they are the first selected contractor on the BOMSOW

WELCOME

ORDERS

FUNDING

REGISTRATION

CONTRACTS

Select a View:

<<-- View Orders -->>



<<-- View Inactive Orders -->>



<<-- View Action Items -->>



<<-- View Support Information -->>



Go to a Specific View Item:

Go

[Create New Order](#)**Orders - Entire Package**

Next -> |

▼ Order Package

▼ ID40120044-COI Sarah Client (Organization Name) AWARDED (Mod 001 - AWARDED)>>IT Commodities procurement

00 Chronology

▶ 01 Electronic Contract File (ECF)

▼ 01 BOM/SOW ID40120044 - 000 Version 00 Amendment 00 AWARDED

▼ Directed Buy - Revision 02

>Certification of Funds - Funds Available (Francine FM)

>Form 1449 - Rejected

>Form 300 - Awarded on 2012-03-05

>FPDS-NG Form - ID40120044-000

▶ 01 Order Mod ID40120044 - 001 AWARDED

03 Req for Accept (Matched) Invoice #: INV0002 Date: 2012-03-05 Invoice Amt: \$15,000.00 - Rejected

03 Req for Accept (Matched) Invoice #: INV0003 Date: 2012-03-05 Invoice Amt: \$15,000.00 - Partial Acceptance

03 Req for Accept (Unmatched) Invoice #: INV002 Invoice Amt: \$7,860.00 - Client Acceptance Requested

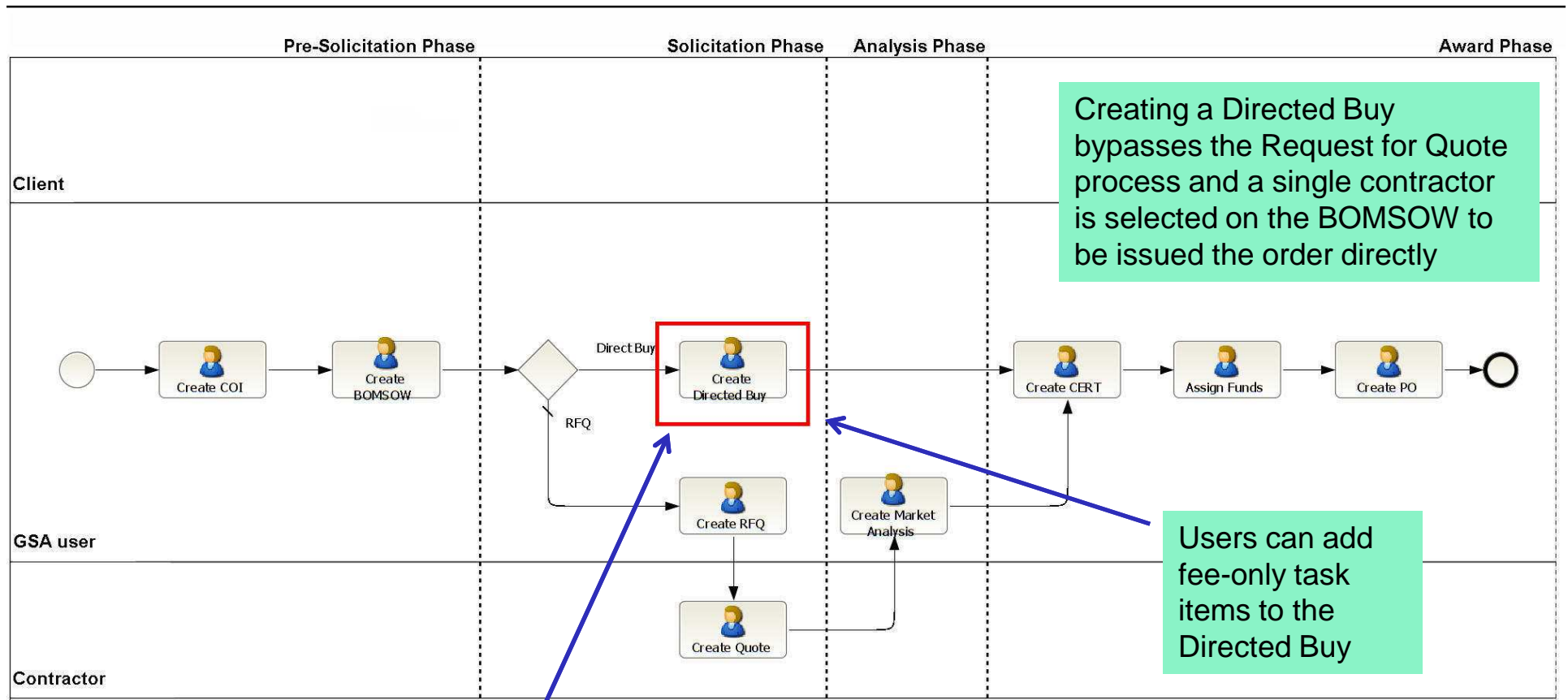
03 Req for Accept (Unmatched) Invoice #: INV0001 Invoice Amt: \$14,800.00 - Accepted

03 Req for Accept (Unmatched) Invoice #: Inv0002 Date: 2012-03-05 Invoice Amt: \$7,860.00 - CSR Acknowledgment Requested

Click on the Directed Buy link in the Order Package View to open an existing Directed Buy in view mode.

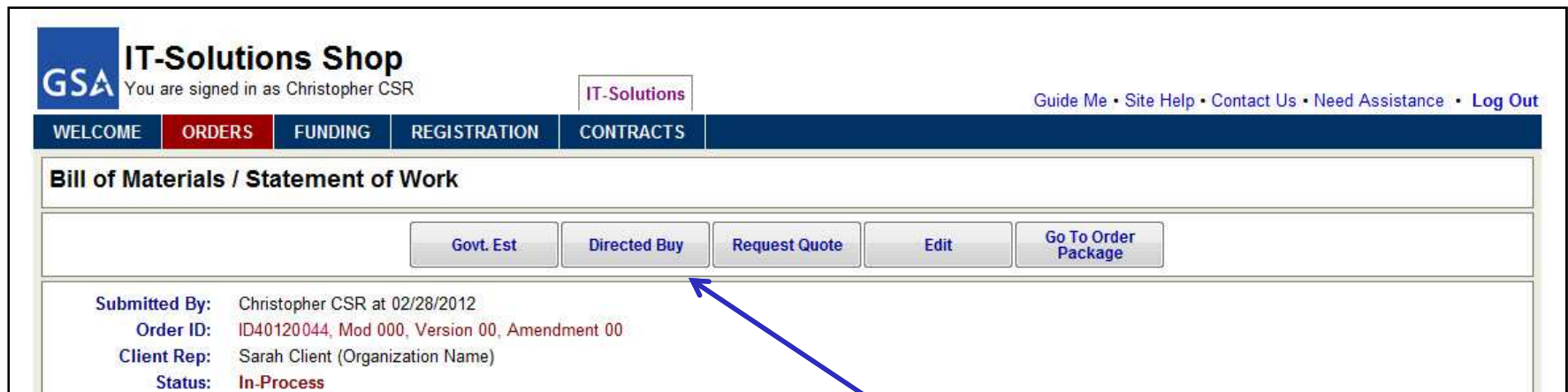
Within the Pre-Award Workflow Context

Directed Buy documents can only be created on the basic order leg (mod 00)



GSA users enter Contractor Proposed Amounts for each task item directly into the Directed Buy *Dollars Subform*. A *Dollars subform* is also displayed on the Market Analysis and Order Modification forms. The Dollars subform has fields for capturing costs, fees, totals, and money-related values. The Dollars subform needs to be populated and submitted prior to certification of funds.

Creating a Directed Buy



GSA IT-Solutions Shop
You are signed in as Christopher CSR

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Bill of Materials / Statement of Work

[Govt. Est](#) [Directed Buy](#) [Request Quote](#) [Edit](#) [Go To Order Package](#)

Submitted By: Christopher CSR at 02/28/2012
Order ID: ID40120044, Mod 000, Version 00, Amendment 00
Client Rep: Sarah Client (Organization Name)
Status: In-Process

To create a Directed Buy, GSA users click the Directed Buy button on BOMSOW. If the **Publish in e-Buy** field on the BOMSOW is set to Yes, the Directed Buy button will not be available.


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Directed Buy

Close Without Saving

All Fields marked with are required.

Submitted By: Christopher CSR at 02/28/2012

Contractor: Steve Contractor (IT INDUSTRY PARTNERS)

Contract Number: under << Open Market >>

PIID Code: A - Agreements (including basic agreements, BOAs and BPAs)

Fiscal Year of Award: 2012

PIID: [To Be Generated]

Contract Type: Fixed Price with Economic Price Adjustment

Order ID: ID40120044, Mod 000, Revision 00

Status: **In-Process**

Directed Buy Details: Details

AND/OR - To complete the Directed Buy, you must enter in either Directed Buy Details (above) or attach one or more document(s)(b) required.

File Attachments:


The Contractor selected on the BOMSOW is automatically pre-populated as the Contractor

Select a Contract Number, PIID Code, Fiscal Year of Award, and Contract Type

The system will automatically generate a standardized Procurement Instrument Identification Number (PIID) upon submission of the Directed Buy

GSA user must enter details about the Directed Buy in the text area or attach a file

File attachments have a maximum size limit of 50 MB per file.
File attachments must have a unique filename within the entire order.


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Directed Buy

[Close Without Saving](#)

All Fields marked with are required.

Submitted By: Christopher CSR at 02/28/2012
Contractor: Steve Contractor (IT INDUSTRY PARTNERS)
Contract Number: under << Open Market >>
PIID Code: A - Agreements (including basic agreements, BOAs and BPAs)
Fiscal Year of Award: 2012
PIID: [To Be Generated]
Contract Type: Fixed Price with Economic Price Adjustment
Order ID: ID40120044, Mod 000, Revision 00
Status: **In-Process**
Directed Buy Details: Details

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w). You may use both

If the winning quote/offer references a contract number that is 'Pending Approval' you will not be able to proceed until that contract number is approved and available for selection.

If the winning quote/offer references an existing contract number (for example, a Schedule or GWAC); you will be given the opportunity to select a from a list of PIID Codes, two of which will result in a 13-character PIID (these are "NA – Delivery/Task Order" and "NA – BPA Call". There is a third option "A – Blanket Purchase Agreement under a Schedule contract" but this will generate a 14-character PIID.

PIID is covered in detail within the *Standardized Numbering Conventions* training module.

If the winning quote/offer does not reference an existing contract number and instead is listed as 'Open Market'; you will be given the opportunity to select from a different list of PIID Codes, all of which will result in a 14-character PIID number.

General
Comments:

Fair Opportunity
Properly
Conducted: ☐ Yes ☒ No

Fair Opportunity
Exception: << Select an Exception >>

Exception
Justification:

If indicated that Fair Opportunity was properly conducted, then a Number of Bids received field will be displayed and required.

If indicated that Fair Opportunity was **not** conducted then Exception and Justification fields will be displayed and required.

Current Project Value: \$0.00 (POP From Date 03/01/2012 To 02/28/2013, Delivery Date 03/01/2012)

Incremental Funding

Will this order use Incremental Funds? ☐ Yes ☒ No

Grand Total for Incremental Funding: \$0.00

Total Contractor Proposed Amount: \$0.00

Fee Calculations

The following fields are used for entire Project order amounts. Task Items marked "Active" will require Funding.

[Add a Task Item](#)

Apply a single surcharge rate across all task items? ☐ Yes ☒ No

Active	Fiscal Task Type	Item No.	Description	Contractor Proposed Amount	Prior Cost to GSA Increase or Decrease	New Task Item Amount	Type of Charge	Fee Amount	Cost to GSA	Cost to Client	Remove
<input checked="" type="checkbox"/>	FFP	1001	Installation / Maintenance - Base Year	\$37,000.00	\$0.00 \$30,000.00	\$30,000.00	Surcharge	12 % \$3,600.00	\$30,000.00	\$33,600.00	
<input checked="" type="checkbox"/>	COM	1002	Mobile Solutions Equipment	\$124,800.00	\$0.00 \$124,800.00	\$124,800.00	Flat Fee	10000	\$124,800.00	\$139,776.00	
<input type="checkbox"/>	FFP	2001	Maintenance - Option Year 1	\$42,000.00	\$0.00 \$42,000.00	\$42,000.00	Surcharge	12 % \$5,040.00	\$42,000.00	\$47,040.00	
<input type="checkbox"/>	FFP	3001	Maintenance - Option Year 2	\$45,100.00	\$0.00 \$45,100.00	\$45,100.00	Surcharge	12 % \$5,412.00	\$45,100.00	\$50,512.00	

Click the button to calculate the total amounts

[Calculate](#)

ORDER TOTALS

Prior Order Cost to GSA:	\$0.00	Prior Order Cost to Client:	\$0.00
Increase/Decrease Order Cost to GSA:	\$154,800.00	Increase/Decrease Order Cost to Client:	\$173,376.00
Total Order Cost to GSA:	\$154,800.00	Total Order Cost to Client:	\$173,376.00

[Submit](#) [Close Without Saving](#)

Services Administration Federal government computer system that is "For Official Use Only".
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Dollars Subform

Click **Submit** to save the Directed Buy and proceed with creation of the Certification of Funds document

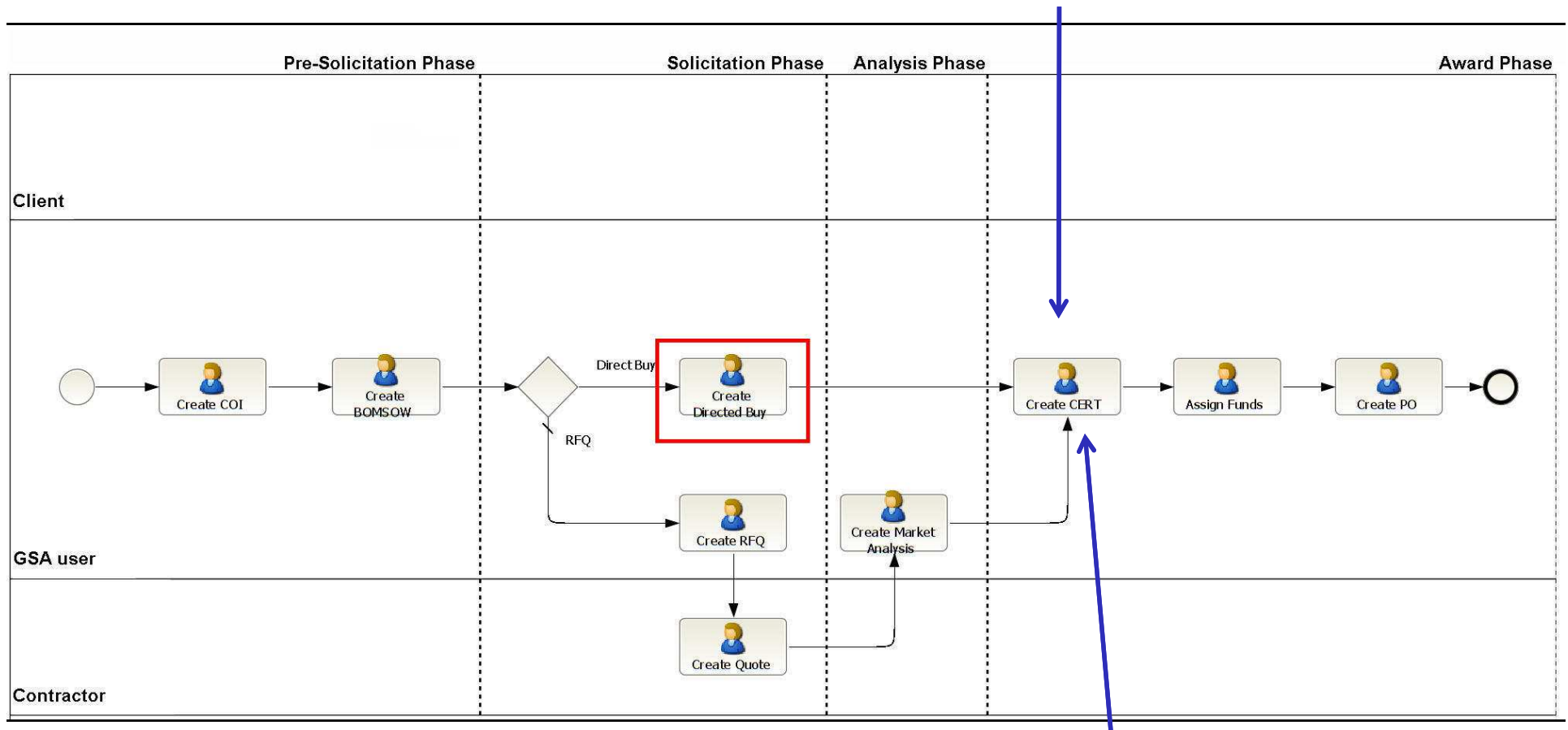
The Dollars Subform is covered in detail within the *Dollars Subform* training module

Directed Buy Status Glossary

Status	Definition
In-Process	Initial starting status of Directed Buy.
Ready	Directed Buy has been submitted, GSA approval is not required and is ready for Certification of Funds.
GSA Recommended	Directed Buy has been submitted, GSA approval required.
Approving Official Accepted	Approving Official has accepted Directed Buy and is ready for Certification of Funds.
Recommendation Rejected	Approving Official has rejected Directed Buy. Order cannot proceed to Certification of Funds. GSA user must create either a new Directed Buy or new RFQ.
Rejected	GSA user rejected Directed Buy. Order cannot proceed to the Certification of Funds. GSA user must create either a new Directed Buy or new RFQ.

Next Steps...

After a Directed Buy is submitted the user is able to create a Certification of Funds (CERT) document



All task item details (item no., description, pop/delivery date, and active flag) are locked-down as non-editable when a CERT is created. Only active task items go on to the CERT for funding.



Federal Acquisition Service

Questions & Support

- For questions regarding AAS Policy please contact randy.matlack@gsa.gov or robert.niewood@gsa.gov
- For questions regarding the RBA Directed Buy training module please contact RBA Technical Support:

Phone: (877) 472-4877

Email: AASBS.helpdesk@gsa.gov

